



**Orange County Department of Education  
Human Resources Department  
Classified Management Class Specification**

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**Manager Categorical Programs and Budget Support**

**Class Code: 1491**

**Work Days: 225**

**GENERAL PURPOSE**

Manage, supervise, plan, analyze, and coordinate accounting functions and requirements for categorical programs including federal, state, and local grants and entitlements; participate in the development and implementation of budget programs for the Department of Education; and provide highly responsible and complex staff assistance to higher level management staff.

**SUPERVISION RECEIVED AND EXERCISED**

1. Receives direction from higher level management staff.
2. Exercises direct supervision over managerial, professional, technical, and clerical staff.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*This position description is intended to describe the general nature and level of work performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.*

1. Participate in the development and implementation of goals, objectives, policies, priorities, and strategic plan for Fiscal Services; identify resource needs; recommend and implement policies and procedures.
  2. Assist in administering the budget including reviewing and monitoring budget levels to ensure compliance with established guidelines; analyze salary and benefit information for budget projections; review the year-end closing process with project accounts.
  3. Select, train, motivate, and evaluate personnel; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline and termination procedures.
  4. Provide coaching to employees; collaborate on goal development, set clear expectations, provide constructive feedback, and check in regularly for understanding.
  5. Plan, prioritize, assign, and review the work of staff responsible for providing categorical program budget support and services; prepare work schedules for appropriate staff.
  6. Serve as major liaison between program managers and state, federal, or local agencies regarding the planning and implementation of categorical programs.
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**ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.):**

7. Confer with Alternative Education staff to solve financial reporting problems, identify needs, and assist in resolution.
8. Coordinate, review, prepare, and approve a variety of correspondence and reports as required.
9. Plan, coordinate, and facilitate training for district and department staff related to categorical programs.
10. Review applicable legislation and new laws and disseminate this information to appropriate school district and department personnel.
11. Work closely with appropriate departmental employees for short-range and long-range planning and implementation of meeting the mission and goals of the organization.
12. Identify opportunities for improving service delivery methods and procedures; review with appropriate management staff; implement improvements.
13. Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of business services.
14. Demonstrate attendance sufficient to complete the duties of the position as required.
15. Perform related duties similar to the above in scope and impact as required.

**QUALIFICATIONS (KNOWLEDGE, SKILL, ABILITY REQUIREMENTS)****Knowledge of:**

1. Modern and complex principles and practices of accounting and budgeting.
2. Procedures, methods, and techniques of project and workflow management and organization.
3. Financial Management Information Systems.
4. Principles of effective supervision, leadership, training, coaching, and performance evaluation.
5. Procedures, methods, and techniques of budget analysis and preparation.
6. Principles and practices of mathematics, statistics, and financial analysis.
7. Methods and techniques used in financial research and revenue forecasting.
8. California Education Code, Administrative Code, and the policies, rules, and regulations of the County Schools Office.
9. Pertinent federal, state, and local laws, codes, and regulations.

**Ability and Skill to:**

1. Select, train, lead, coach, direct the work of, supervise, and evaluate management, supervisory, professional, and technical employees; effectively delegate authority and responsibility.
2. Interpret the organizational and division strategic plan and create relevant goals and plans for assigned areas.
3. Analyze and interpret financial and accounting records.

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**Ability and Skill to (cont.):**

4. Establish and maintain effective working relationships with various constituencies.
5. Understand, Interpret, and explain laws, codes, contracts, policies, and procedures.
6. Develop and present training materials.
7. Prepare clear and concise correspondence, reports, and other written materials.
8. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
9. Communicate clearly and concisely, both orally and in writing, in English; present information effectively in front of both large and small groups.

**Education, Training, and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is a Bachelor's degree from an accredited college or university with major course work in accounting, finance, business, public administration, or a related field and four years of finance, budgeting, accounting or related experience.

**PHYSICAL AND MENTAL DEMANDS**

*The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

**Physical Demands**

While performing the duties of this job, employees are regularly required to bend, stoop, push, pull, grasp, squat, twist, kneel, walk, sit, and reach to access materials or equipment and complete other tasks as assigned; lift and carry up to 25 pounds; and lift from ground, waist, chest, shoulder, and above shoulder level. The position may include occasional need to traverse uneven surfaces.

Employees in this classification are to be able to travel countywide to a variety of sites within a reasonable time frame; read written and electronic materials; communicate clearly in person, on the phone, and via email; and operate all required equipment.

**Mental Demands**

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines and meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

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## **WORK ENVIRONMENT**

*The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Employee typically works in an office environment that is fast paced with high pressure.

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